

Communicate more effectively with our Advisor360° Extended offering

Get everything in our Advisor360° Essentials offering plus a client portal and more advanced advisor workflows.

Advisor360° helps satisfy your most discerning advisors and their clients with a modern, digital wealth management platform that provides a shared, comprehensive view of household wealth.

Our Advisor360° Extended offering delivers an advisor portal with advanced workflows and a client portal that includes texting, secure messaging, and mobile apps. Advisors are able to share a common view of a household’s financial situation with their clients and communicate effectively, any time, from any device.

Unified Data Fabric™

Our Unified Data Fabric is the foundation of our platform—cleaning, normalizing, and enriching data from hundreds of sources.

Essentials	Extended	Enterprise
<p>Our core Advisor360° Essentials offering includes:</p> <ul style="list-style-type: none"> Unified Data Fabric™ Advisor portal (includes insurance; 1-Click Review® reports; practice-level analytics; document vault) Third-party software integrations 	<p>Everything in Advisor360° Essentials, plus:</p> <ul style="list-style-type: none"> Deeper advisor experience (proposal creation; trading; model management /rebalancing; analytics) Client portal with digital engagement tools (includes compliant text messaging and account aggregation) Home office trading workflow Quicken®/TurboTax®/H&R Block®/TaxAct® integrations 	<p>Everything in Advisor360° Extended, plus:</p> <ul style="list-style-type: none"> Deepest advisor experience with digital onboarding and fee billing Enterprise workflow system Imaging Account maintenance tools Compliance management

With Advisor360° Extended, you’ll get:

- Industry-leading advisor experience:** A world class portal that equips your advisors with all they need to manage their practices and client relationships. This includes everything in our Advisor360° Essentials offering, plus proposal creation, trading, model management/rebalancing, and analytics.
- Client portal:** Enjoy seamless advisor-client communications with compliant text messaging and data aggregation for assets not held with the custodian. Advisors share a common view of a household’s financial situation with their client and, with our mobile apps, are able to communicate securely from their office or on the go.

- **Home office trading workflow:** Create, manage, and rebalance models for every client across a practice within a single platform. Trades can also be entered without leaving the platform and administered seamlessly by your home office staff.

Deepen advisor-client relationships

Deliver the modern tools advisors need to serve clients with high expectations. Help wealth management advisors:

- **Rebalance:** Rebalance portfolios with a complete view of a household's financial situation.
- **Advise:** Share a common view between advisors and clients of all assets, including those not held with the custodian (e.g., 401[k], HSA).
- **Trade:** Execute trades on behalf of clients without leaving the Advisor360° platform.
- **Communicate:** Use compliant text messaging to connect with clients.
- **Propose:** Share modern, professional proposals for clients and prospects.

What's included

Get everything in our Advisor360° Essentials offering, plus

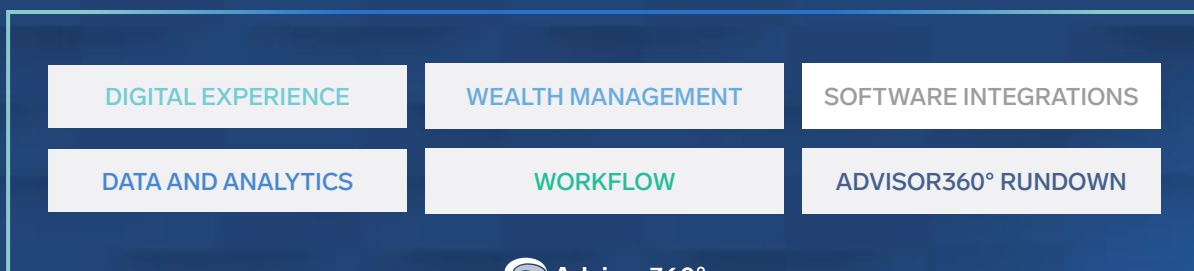
- Deeper advisor experience (proposal creation; trading; model management /rebalancing; analytics)
- Quicken®/TurboTax®/H&R Block®/TaxAct® integrations
- Home office trading workflows
- Client portal with digital engagement tools (includes compliant text messaging and account aggregation)

Unstack your tech stack

Advisor360° gives you and your advisors all you need, without more than you need.

Contact us to learn how our platform can help your advisors be more productive.

sales@advisor360.com



Advisor360° is a Software as a Service provider that builds and delivers integrated technology for wealth management firms. The company's proprietary Unified Data Fabric™ synthesizes complex and disparate data streams into one platform for a highly sophisticated wealth planning solution. Today, 3 million households representing \$1 trillion in assets benefit from the integrated Advisor360° experience.

To learn more, visit advisor360.com